

EXECUTIVE SUMMARY

Winter combinable crops in the UK have suffered a lot of very wet weather this year, from planting and establishment through to late March and beyond. As a result, crop conditions are more varied than usual. The crops now, are not the best we have ever seen, but have surprised many people with their improvement from earlier in the year. Whilst some parts of the country are looking more or less as they should, there are notable bare patches and large gaps, particularly in wet corners and headlands across several regions. Central England is particularly affected. As mentioned in previous analysis, leafy crops do not always translate into high yields, and we do not expect records this year.

The crops have all caught up with their normal crop development progress and are on track for a timely harvest having sped through some growth stages at a remarkable pace. How much this will have impacted yield is yet to be seen.

Throughout the UK, the variation in winter crop condition is striking. Differences in soil types, drilling dates and subsequent rainfall significantly affected crop establishment. Additionally, these factors have hindered growers' ability to apply treatments in a timely manner both pre- and post- emergence. Most inputs have now been applied to all crops, perhaps excepting the pre-harvest treatments.

The effects of a difficult winter for much of the UK were felt long into the spring. Saturated soils and compaction issues due to heavy rainfall caused delays in spring drilling across many regions. However, conditions eventually improved, allowing most spring crops to be established in good order. Winter crops also responded positively to the better weather and managed to recover well.

Many in Scotland, a country dominated by spring crops, are pleased with crop performance so far. Ploughing and therefore drilling was late, but crops are looking healthy and full. Welsh and Northern Irish crops are not looking so strong but have rebounded since spring weather settled a little more.

The information in this report was captured up to Wednesday 03 July 2024 for AHDB by The Andersons Centre.

CROP CONDITION AND GROWTH STAGES

Crop Condition ratings have been undertaken using the USDA methodology. The national (GB) scores are provided here, with regional ratings on the [AHDB website](#).

Crop condition definitions:

Very poor: Extreme degree of loss to yield potential, complete or near crop failure.

Poor: Heavy degree of loss to yield potential, which can be caused by excess soil moisture, drought, disease etc.

Fair: Less than normal crop condition. Yield loss is a possibility, but the extent is unknown.

Good: Yield prospects are normal. Moisture levels are adequate and disease, insect damage and weed pressure are minor.

Excellent: Yield prospects are above normal. Crops are experiencing little or no stress. Disease, insect damage and weed pressures are insignificant.

GB crop condition ratings

	Very Poor	Poor	Fair	Good	Excellent
Winter Wheat	6%	8%	30%	35%	21%
Winter Barley	2%	9%	20%	41%	28%
Winter Oats	7%	13%	22%	41%	16%
Winter OSR	3%	18%	25%	40%	14%
Spring Wheat	0%	17%	23%	51%	8%
Spring Barley	0%	6%	22%	35%	36%
Spring Oats	0%	3%	19%	56%	21%
Spring OSR	1%	5%	19%	35%	4%

Source: The Andersons Centre

Note: Figures may not sum to 100% due to rounding

WHEAT

Overall

Nationally, 56% of winter wheat is rated as either good or excellent, up slightly from 55% last month. This remains well below the same time last year (week ending 4 July 2023), when 76% of the crop was rated in this condition.

Many winter wheat fields are not looking as tidy as usual or as many farmers would wish their crops to look at this time of year. The fact that most fields have a crop at all is, in some parts of the UK a surprise to many who expected more fallow and failed crops given the situation earlier in the year. Those who kept investing in their winter wheat are largely pleased with their decisions. Spring wheats are looking well.

Crop Development

Crops have played catch up and are largely where they should be at this time of year. But having sped through the growth stages, it is unclear whether the full looking crops will also be carrying the intended yield; many advisors have their doubts. The conditions of most crops have progressed in the last month, but a few, notably in the North West have gone backwards a little.

Nutrition

Nutrition applications are now completed apart from some late foliar nitrogen, to boost the grain protein particularly in milling wheat varieties. Those with any chance of a milling wheat premium will be wanting to chase them as hard as possible, with the premiums currently high. It's been easy to find the necessary cool conditions for these applications this year.

Pest, weed and disease pressures

Septoria has been an issue this year and some fields will have lost yield as a result. However, this has been a most unusual year and having suffered record rainfall in some regions, the levels are tolerable.

Winter wheat has been a very sickly crop in many parts, including in the East this year, with poor growing conditions coupled with late or non-applications. Some early drilled and leafy wheat crops are struggling to cope with the disease pressure, even with well timed fungicides. Sunshine is the most important input required now for most winter wheat crops.

T3 applications are now complete and could prove important this year, with so many infections lurking in the plant and soils. The value of milling wheat certainly warrants added protection, and feed crops could be badly damaged without it in some regions, in particular the Midlands and North including Scotland. Wheats in Scotland have been under a lot of disease pressure.

This year has been a very difficult year for blackgrass. Pre-emergent herbicides were, in many cases, not applied. Where they were, many were not effective due to wet and cold conditions. Then, weak wheat plants did not smother emerging grass weeds sufficiently. More fields than usual have had to be sprayed off completely before black grass reached its point of flowering and seed development. This was a bold decision made by forward looking farmers in a bid to protect future years' productivity.

Winter wheat is now almost beyond being further affected by aphids, but growers still need to keep an eye on milling varieties and the AHDB thresholds. Spring wheat still requires care.

Prospects

More disease resistant varieties have clearly outstripped those with less resistance this year. From the start they had the clear advantage, and it is therefore likely these varieties will out-yield the others.

A difference is also visible between those fields where farmers tried to cut their losses early on and those where farmers continued to protect their in-field crops. When the economics are worked out, we will see which strategy paid off more.

WINTER BARLEY

Overall

The percentage of the GB winter barley crop rated as either good or excellent is 69%. This is up from the 62% last month, but down from 84% a year ago. The winter barley crop is starting to turn golden, and sunshine would be welcomed for this crop now to swell the emerging grain. It has coped with the poor winter weather conditions well and some farms appear to have big yields in the ear. If the crops can remain standing for another few weeks, the finished product might be quite good. Winter barley was more established last autumn when the deluges began, so had a greater resilience than the majority of wheat crops. Even in the worst hit regions of the Midlands, many fields are looking comparatively strong.

Pest, weed and disease pressures

Spraying is completed now. Overall, the fungicides have done a pretty good job, but we complete the season with infection on some upper leaves.

Some patches of grass weeds, bromes and blackgrass in particular, are concerning high. There were fewer opportunities to manage them this year. This is less concerning for some winter barley that is grown for an early harvest for forage in the livestock regions but most of course will be harvested as grain.

Some diseases in barley have threatened early senescence including net blotch, brown rust and some ramularia. There is still a high level of soil moisture in most regions, which is good for the crop but also encourages diseases. Some stem diseases are also present, such as eyespot. Well treated crops are looking totally different to those that have not had such good timing or attention when it comes to protection.

Some fields will require pre-harvest desiccation.

Prospects

Overall, the crops are looking better than most expected. Hybrid varieties are in better shape than conventional. Crops in some regions, the West and Wales in particular, are a little behind, but not by much and will have caught up by harvest.

OATS

Overall

Nationally, the good or excellent ratings for winter and spring oats are 57% and 77%, respectively. These are up from 52% and 73% last month. A year ago, 74% of winter oats and 69% of spring oats were rated good or excellent.

Oats are a hardy crop, they remain close to the ground for longer than wheat or barley, resisting rabbits and other pests. The majority of oats are spring planted, and this year was particularly true. Overall, the crop is looking well and strong, especially spring crops, although some look rather stressed following the heavy rain, for example in Scotland.

Prospects

Spring oats in Northern England and Scotland are bold and healthy overall and could yield well. Further south, the winter crops are moderate to fair compared with other seasons, but when compared with other crops this season, stand strong.

OILSEED RAPE

Overall

The national rating for winter oilseed rape is 54% as either good or excellent, this is slightly higher than the 49% last month. But it is still below last year's 63%.

Oilseed rape is now in the process of ripening, and some desiccation has already taken place. Gaps in fields may have been filled with weeds so cleaning might be required ahead of harvest.

Many are not best pleased with their oilseed rape crops and yields are not expected to be anything to brag about. Some people have already reopened the question about its viability as the number one break crop. A short flowering stage as the plant played catch up probably means shorter pods with fewer seeds in each one.

Pest, weed and disease pressures

Some growers have been using pod stickers to prevent pods from shattering early and losing their seeds this year.

Prospects

Some crops are looking well and full, but there are many gaps. Overall yield will be lifted when the failed land is taken out of the equation, and this should not be overlooked when all is completed. Crops in the West generally look better than in the Midlands or East.

SPRING BARLEY

Overall

Across GB, 71% of spring barley is now classified as either good or excellent, up from 55% last month. This is also a higher proportion than the same point last year, when just 53% was rated as in good or excellent condition. The spring has provided excellent growing conditions on the whole. Flag leaves are now emerging. Spring barley crops are mostly very good but may yet develop ramularia.

Pest, weed and disease pressures

Some unsettled weather has raised concerns about Rhynchosporium, particularly in the West and South of England. Thick crops have meant plant growth regulators have been needed more than usual.

T2 fungicides are about to be applied. Rust is a concern in some fields. Whilst in good shape for most regions, weather has been varied and unpredictable meaning a variety in crop conditions.

Some crops are weedy as is the case with all crops this year, but with cold nights, some growers are holding off herbicides to prevent holding crops back.

Prospects

For most regions, spring crops look the fittest. Bearing in mind spring weather has continued damp but not as extreme as winter, some consider the potential for good yields is present. Short of the need for sunshine, spring crops including barley could offer the best of a very difficult year for combinable cropping.